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World Production and Trade

United States Department of Agriculture
Foreign Agricultural Service
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Weekly Roundup
WR 46-86
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COMPLETED

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

ORIGINAL

GRAIN AND FEED

The EUROPEAN COMMUNITY Targets EYGPT and ALGERIA for Special Wheat Subsidies. The European Community (EC) offered a special one-day subsidy of 23.5 ECU per metric ton ($24 per ton), on top of the current 130 ECU per ton ($133 per ton) export subsidy, for wheat destined to Egypt and Algeria. Despite the rejection of all bids, this offer notifies traders of the subsidy levels the EC is considering when it holds a special tender in December and January for 320,000 tons of wheat for export to these two markets. In the past two months, the EC has been offering sharply reduced wheat export prices in the Mediterranean in an effort to regain market share and reduce burgeoning wheat surpluses. This has been particularly evident in Egypt and Algeria where recent sales of EC wheat for $67 per ton and $63.50 per ton, free on board (FOB), respectively, have been well below the August FOB prices of about $90 per ton.

OILSEEDS AND PRODUCTS

SPAIN Halts Imports of Confectionery Sunflowerseed. The Spanish government has stopped imports of confectionery sunflowerseed in response to domestic political pressure to protect Andalusian producers from lower-priced imports. After trying unsuccessfully to persuade Spanish roasters to purchase domestic sunflowerseed, the government stopped issuing import authorizations. Spain imported 2,100 tons of confectionery sunflowerseed from all sources in 1985, while its imports from January to August 1986 totaled 3,459 tons.

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DAIRY, LIVESTOCK AND POULTRY

WORLD Milk Production Up Slightly in 1986. World milk production is expected to total 423 million tons in 1986, about 1 percent above the 1985 level. Strong growth in Mexico and the USSR more than offset declines in Brazil and East Europe. World milk production is expected to stabilize in 1987 as declines in the United States and the EC-12 offset growth in other countries. Cow numbers declined slightly in 1986 but an increase is expected in 1987. World production of butter is up 2 percent in 1986 due in part to a lack of alternative uses for milk in the EC and to continued increases in domestic demand in the USSR. Cheese production in 1986 is estimated at 9.7 million tons, 3 percent above 1985. Growth of cheese production in the EC was limited to 1 percent after annual increases of over 2 percent during most of the past 5 years.

In the United States, the number of cows is declining because of the dairy termination program, but annual milk production will not decline until 1987 due to program timing. Canadian policies have largely stabilized cow numbers and milk production. Mexican output in 1986 is expected to show a 15-percent increase due to a sharp jump in cow numbers and to greatly improved pasture conditions and feed supplies. Much of the rapid growth actually represents continued recovery from the drought years of 1983 and 1984.

Cows and Milk Production in Selected Countries

	Number of Cows			Milk Production		
	1985 1/	1986 2/	1987 2/	1985 1/	1986 2/	1987 2/
	Million Head			Million Tons		
United States	11.0	10.8	10.4	65.2	65.8	64.3
Canada	1.7	1.7	1.7	7.9	7.9	7.9
Mexico	5.1	5.9	6.5	6.9	8.0	8.8
Brazil	14.7	14.0	15.3	10.4	9.8	10.8
EC-12	27.2	26.6	26.1	114.6	115.4	113.9
East Europe	15.3	14.8	14.8	43.5	42.6	42.2
USSR	43.6	42.9	42.8	98.6	101.0	102.0
Australia 3/	1.8	1.8	1.8	6.3	6.2	6.2
New Zealand 4/	2.2	2.2	2.2	7.9	8.2	8.0
Total of 38 Countries	163.5	162.6	163.7	417.9	423.2	423.4

1/ Preliminary. 2/ Forecast. 3/ Year ending June 30. 4/ Year ending May 31.

Brazilian milk output is expected to total 9.8 million tons in 1986, 6 percent below 1985 and the lowest since 1977. Causes for the decline include a severe drought in the central-south region early in the year and a price freeze imposed by the government as part of its economic package. Milk producers say prices were set well below the cost of production and that even the 30-percent subsidy effective during July-December was insufficient to prevent further monetary losses.

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In the EC, 1986 milk production is expected to be up slightly despite the quota system. Generally favorable pasture conditions and lower prices for concentrate feed boosted productivity and sent many dairies over their annual quota for 1985/86. This higher productivity continued throughout the summer. Within the EC, 1986 milk production in Germany and the Netherlands is expected to increase 2 percent, in France about 1 percent, and no change in the United Kingdom and Italy. For 1987, EC milk production is forecast to decline about 1 percent while cow numbers decline about 2 percent.

In East Europe, a lack of profitability in dairying, particularly for private farmers, has led many to reduce their herds. As a consequence, 1986 milk production is expected to decline, especially in Poland and Yugoslavia.

Favorable winter forage supplies in the USSR for both the spring and fall feeding seasons plus more plentiful supplies of concentrate feeds are expected to facilitate a 2.5-percent increase in Soviet milk production despite a continued decline in cows. For 1987, further increases in productivity are expected to more than offset another small decline in cow numbers.

Australia's 1985/86 milk production was down about 1 percent, but improvement in profitability is expected to cause 1986/87 milk production to remain at the year-earlier level. In New Zealand, 1985/86 milk production was up 4 percent due to favorable conditions for pasture growth and a lengthened milking season as farmers tried to take advantage of the higher guaranteed prices. For 1986/87, production is expected to decline about 3 percent due to less favorable pasture conditions at the start of the season and to government programs designed to limit production.

World butter production is expected to total 6.9 million tons in 1986, 2 percent above 1985. Most of the change is in the EC where limited markets for cheese forced producers to divert milk to butter manufacture where intervention provides a guaranteed market. Increased milk production facilitated a 2-percent increase in butter production in the USSR. Butter production in the United States declined about 8 percent as milk production began to fall and more milk was used for cheese manufacture.

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Production of Dairy Products in Selected Countries

	Butter			Cheese			Nonfat Dry Milk		
	1985 1/	1986 2/	1987 2/	1985 1/	1986 2/	1987 2/	1985 1/	1986 2/	1987 2/
	1,000 Metric Tons								
United States	585	540	465	2,279	2,365	2,415	631	585	470
Canada	108	106	105	213	225	235	102	100	98
EC-12	2,013	2,147	2,047	3,962	3,991	4,007	1,946	2,162	1,984
East Europe	862	844	825	695	718	696	216	203	198
USSR	1,596	1,630	1,650	809	825	830	260	280	300
Australia 3/	114	105	98	160	169	170	148	125	117
New Zealand 4/	293	301	275	118	127	140	242	215	238
Total 5/	6,756	6,871	6,671	9,444	9,708	9,838	4,041	4,142	3,884

1/ Preliminary. 2/ Forecast. 3/ Year ending June 30. 4/ Year ending May 31.
5/ Includes 35 countries for butter, 34 countries for cheese, and 30 countries for nonfat dry milk.

World cheese production in 1986 is estimated at 9.7 million tons, 3 percent above 1985. Most of the increase is in the United States. Less favorable markets kept the increase in EC production below 1 percent compared to increases of over 2 percent in most of the last 5 years. EC cheese production is expected to be unchanged in 1987. New Zealand's cheese production was up over 7 percent in 1985/86 and an even larger increase is expected in 1986/87. Lack of storage and markets for butter and some success in exports of non-traditional cheeses are stimulating the higher output.

World production of nonfat dry milk (NDM) is expected to total 4.1 million tons in 1986, 2.5 percent above 1985. Most of the increases are occurring in the EC as a result of the relationship between markets for cheese and butter. The United States, Canada, Australia and New Zealand are expected to have lower production in 1986 as various control measures meet with some success. If EC milk production turns down as expected, EC and world production of NDM in 1987 will show a downturn.

World casein production is expected to total 233,000 tons in 1986, 1 percent above 1985. EC production is down in 1986, while New Zealand shows a sharp increase. World production in 1987 is expected to remain at the 1986 level with an increase forecast for New Zealand which will offset a decline forecast for Eastern Europe.

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COTTON

INDONESIA Simplifies Import Procedures for Some Cotton Products. The U.S. agricultural counselor in Jakarta reports that certain cotton products (cotton linters, cotton waste, carded or combed cotton, suitable for cleaning machines, and other cotton) are no longer subject to Indonesian import regulations and may be imported by any importer with a general trade license. However, cotton under the category not combed or carded, which accounts for over 99 percent of Indonesian cotton imports, still must be imported by one of six government-approved (and government-owned) importers. P.T. Cerat Bina Tekstil Indonesia (CBTI), which was created February 18 as the sole cotton importer and distributor, was not included as one of these six approved importers.

CREDIT NOTES

GSM-102 Actions Announced for ALGERIA. USDA has made available an additional $30 million in GSM-102 credit guarantees for the sale of U.S. semolina to Algeria.

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Public Law 480 Agreement Signed with SRI LANKA. A P.L. 480 agreement was signed with Sri Lanka, providing for the sale of $12 million worth of U.S. wheat.

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of Nov. 17, 1986, was as follows in metric tons:

ANNOUNCED INITIATIVES		DATE ANNOUNCED	QUANTITY/RESULTS	
51.	Gulf countries (Bahrain Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	1,500 head	
50.	West Africa (Cameroon Cote d'Ivoire, Ghana, Togo) wheat	Oct. 30, '86	345,000	
49.	Dominican Republic poultry	Oct. 29, '86	1,500	
48.	Philippines barley malt	Oct. 20, '86	60,000	Sold 25,000
47.	Cameroon wheat flour	Oct. 14, '86	20,000	
46.	Romania barley	Sept. 24, '86	200,000	Sold 100,000
45.	Venezuela barley malt	Sept. 4, '86	100,000	
44.	Cyprus barley	Aug. 26, '86	150,000	Sold 50,000
43.	Canary Islands wheat	Aug. 8, '86	100,000	
42.	Egypt semolina	Aug. 6, '86	30,000	Sold 15,000
41.	Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40.	Canary Is. dairy cattle	July 28, '86	3,000 head	

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EXPORT ENHANCEMENT INITIATIVES (CONT)

39.	Hong Kong table eggs	July 28, '86	44 million	
38.	Senegal wheat	July 17, '86	100,000	COMPLETE
37.	India vegetable oil	July 8, '86	25,000	
36.	Jordan barley	June 17, '86	60,000	
35.	Israel barley	June 17, '86	200,000	Sold 36,200
34.	Tunisia dairy cattle	May 29, '86	4,000 head	
33.	Algeria dairy cattle	May 29, '86	5,000 head	
32.	Sri Lanka wheat	May 16, '86	125,000	Sold 75,000
31.	Saudi Arabia barley	May 7, '86	500,000	COMPLETE
		Aug. 6, '86	250,000	COMPLETE
		Sept. 16, '86	300,000	COMPLETE
		Oct. 8, '86	200,000	COMPLETE (201,000)
30.	Algeria barley	Apr. 17, '86	500,000	
29.	Morocco dairy cattle	Apr. 16, '86	4,000 head	Sold 335
28.	Turkey dairy cattle	Apr. 16, '86	5,000 head	
27.	Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
		Sept. 12, '86	10,000 head	Sold 80
26.	Yemen poultry feed	Apr. 14, '86	150,000	
25.	Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
		June 24, '86	200,000	Sold 190,950
		Oct. 7, '86	500,000	
24.	Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
23.	Syria wheat	Apr. 8, '86	700,000	CANCELLED
22.	Benin wheat	Apr. 7, '86	45,000	Sold 30,000
21.	Algeria table eggs	Apr. 4, '86	500 million	
20.	Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 200
19.	Jordan wheat	Mar. 19, '86	75,000	COMPLETE
		June 20, '86	75,000	COMPLETE
18.	Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
		Aug. 22, '86	800,000	Sold 250,000
17.	Algeria wheat flour	Feb. 25, '86	100,000	
16.	Algeria semolina	Feb. 11, '86	250,000	
15.	Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
14.	Zaire wheat	Dec. 27, '85	40,000	COMPLETE
		May 15, '86	40,000	COMPLETE
		Oct. 17, '86	40,000	
13.	Nigeria barley malt	Dec. 10, '85	100,000	Sold 4,400
12.	Iraq wheat flour	Dec. 9, '85	150,000	Sold 100,000
11.	Egypt poultry	Nov. 26, '85	8,000	COMPLETE
		Mar. 21, '86	15,000	COMPLETE
		June 18, '86	5,000	COMPLETE
		July 8, '86	15,000	COMPLETE

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EXPORT ENHANCEMENT INITIATIVES (CONT)

10.	Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
		May 15, '86	30,000	Sold 15,000
9.	Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
8.	Jordan rice	Nov. 8, '85	40,000	Sold 38,700
7.	Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
		May 8, '86	500,000	
6.	Morocco wheat	Sept. 30, '85	1,500,000	Sold 890,000
5.	Yemen wheat	Sept. 6, '85	100,000	COMPLETE
4.	Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
		Apr. 14, '86	100,000	Sold 63,000 LT
3.	Egypt wheat	July 26, '85	500,000	COMPLETE
		Oct. 30, '85	500,000	COMPLETE (512,500)
		June 24, '86	500,000	COMPLETE
		July 29, '86	52,000	Sold 29,000
		Oct. 8, '86	1,000,000	
2.	Egypt wheat flour	July 2, '85	600,000	COMPLETE
		Aug. 6, '86	600,000	
1.	Algeria wheat	June 4, '85	1,000,000	COMPLETE
		Apr. 10, '86	1,000,000	Sold 249,000
		Nov. 10, '86	300,000	

EXPORT ENHANCEMENT PROGRAM SUMMARY
Status as of Nov. 17, 1986

Announced to Date	17,052,438 (grain equivalent) 544 million table eggs 44,500 tons frozen poultry 52,500 head dairy cattle 25,000 tons vegetable oil
Sold to Date	5,915,459 wheat 1,292,622 flour (grain equivalent) 1,462,200 barley 20,550 semolina (grain equivalent) 39,199 barley malt (grain equivalent) 38,700 rice 43,000 frozen poultry 14,115 head dairy cattle
Total Sales Value:	$906.7 million
Estimated Bonus Book Value:	$518.2 million.

TARGETED EXPORT PROMOTION PROGRAM

The status of USDA's Targeted Export Promotion Program as of Nov. 19, 1986, was as follows:

DATE ANNOUNCED	COMMODITY	VALUE	COUNTRY
Oct. 30, 1986	Sunflowerseed and products	$3.0 million	Japan, Mexico, Venezuela, Portugal
Oct. 29, 1986	Chocolate	$2.5 million	Japan, Korea, Taiwan, European Community
Oct. 9, 1986	Red meat	$7.0 million	Japan, Hong Kong
Oct. 8, 1986	High-value and processed foods	$3.2 million	All countries
Oct. 3, 1986	Pasta products	$2.1 million	Caribbean, Pacific Rim, Middle East
Oct. 2, 1986	Cotton	$7.0 million	Western Europe, Asia
Oct. 1, 1986	Pistachios	$0.2 million	Pacific Rim
Sept. 30, 1986	Soybeans	$8.5 million	European Community
Sept. 29, 1986	Peanuts	$4.5 million	Western Europe
Sept. 19, 1986	Processed foods	$0.3 million	West Germany
Sept. 17, 1986	Processed foods	$1.4 million	Pacific Rim
Sept. 16, 1986	Processed foods	$0.5 million	Pacific Rim, Western Europe, Middle East, Caribbean
Sept. 16, 1986	Wine	$2.5 million	Pacific Rim, Western Europe
Sept. 12, 1986	Rice	$3.5 million	European Community, Middle East, Africa Southeast Asia, Caribbean
Sept. 8, 1986	Fresh pears	$0.3	Scandinavia, Arabian Gulf, Pacific Rim
Sept. 2, 1986	Wheat	$2 million over 3 years	Egypt, Algeria
Aug. 12, 1986	Canned Peaches, Fruit Cocktail	$5.6 million 1/	Pacific Rim & Middle East
Aug. 8, 1986	Feed Grains	$2.1 million	To be announced
July 28, 1986	Dry Peas & Lentils	$2.5 million	EC, Colombia, India
July 25, 1986	Table Grapes	$0.35 million	Japan
July 18, 1986	Washington State Apples	$1.4 million	United Kingdom, Taiwan, Malaysia, Hong Kong, Norway, Middle East
July 17, 1986	Wood Products	$0.65 million 2/	United Kingdom
July 16, 1986	Wheat	$1.1 million	Developing countries
July 14, 1986	Poultry & Eggs	$6 million	Pacific Rim, Middle East countries
June 24, 1986	Feed Grains, Soybean Meal & Dairy Cattle	$9 million over 3 years	Algeria
June 23, 1986	Fresh & Processed Florida Citrus	$4.6 million	Western Europe & Pacific Rim
May 20, 1986	Dried Prunes	$4 million	Western Europe

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TEA PROGRAM SUMMARY CONT.

April 30, 1986	Wood	$1.95 million (over 3 years)	Japan
April 28, 1986	Wine	$2.3 million	Japan, United Kingdom, Hong Kong, Singapore
April 25, 1986	Almonds	$0.9 million	Western Europe, Japan, Korea
April 17, 1986	Canned Peaches, Fruit Cocktail	$2.5 million	Japan, Taiwan
April 16, 1986	Walnuts	$9 million 3/	Western Europe, Japan, Australia
April 16, 1986	Raisins	$6.3 million	Western Europe, Pacific Rim, Middle East
April 14, 1986	California & Arizona fresh & processed citrus	$8.5 million	Western Europe, Pacific Rim
March 27, 1986	Frozen Potatoes	$2 million	Japan, Hong Kong Taiwan, Malaysia Singapore
	Total:	$119.07 million	

1/ Includes $0.5 million announced Nov. 4, 1986.
2/ Part of April 30, 1986, wood TEA amount. Not included in total.
3/ Includes additional $2 million announced Aug. 1, 1986.

Selected International Prices

Item	November 18, 1986		Change from a week ago	A year ago
ROTTERDAM PRICES 1/	$ per MT	$ per bu.	$ per MT	$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%.	N.Q.	--	--	N.Q.
U.S. No. 2 DNS/NS: 14%....	138.00	3.76	+2.00	178.00
U.S. No. 2 S.R.W.	N.Q.	--	--	153.50
No. 3 H.A.D.....	143.00	3.89	-0-	170.00
Canadian No. 1 A: Durum...	155.00	4.22	-0-	N.Q.
Feed grains:				
U.S. No. 3 Yellow Corn....	85.00	2.16	+3.00	119.50
Soybeans and meal:				
U.S. No. 2 Yellow.....10/	201.80	5.49	-1.60	204.50
Brazil 47/48% Soya Pellets	201.00	--	-2.00	182.00
U.S. 44% Soybean Meal.....	182.00	--	+0.50	167.00
U.S. FARM PRICES 3/ 10/				
Wheat.....	88.54	2.41	-0-	116.47
Barley.....	66.14	1.44	-0.46	65.22
Corn.....	61.42	1.56	-0.79	92.91
Sorghum.....	49.92	2.26 2/	-0.66	74.96
Broilers.....	1276.46	--	+11.24	1198.86
EC IMPORT LEVIES				
Wheat 5/.....	187.80	5.11	+1.35	118.25
Barley.....	179.80	3.91	+1.15	104.70
Corn.....	170.75	4.34	--	86.20
Sorghum.....	171.50	4.35	-1.55	96.95
Broilers 4/ 6/ 8/.....	--	--	--	--
EC INTERVENTION PRICES 7/ 9/				
Common wheat(feed quality)	188.45	5.13	+0.20	159.75
Bread wheat (min. quality)	197.70	5.38	+0.25	170.30
Maize.....	197.70	5.02	+0.25	159.75
Barley and all other feed grains, excluding maize.	188.45	--	+0.20	159.75
Broilers 4/ 6/.....	--	--	--	--
EC EXPORT RESTITUTIONS (subsidies)				
Wheat	N.A.	--	--	60.45
Barley.....	N.A.	--	--	70.20
Broilers 4/ 6/ 8/.....	--	--	--	--

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/Amounts appearing in column headed "Changes from a week ago" do not reflect prices appearing in WR 45-86 due to Veterans' Day holiday. N.A.=None authorized. N.Q.=Not quoted. Note: Basis December delivery.

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